OPPENHEIMER WOLFF & DONNELLY, LLP
Stefanie M. Howell at 650-320-4000
Title: A SYSTEM AND METHOD FOR EVENT MARKETING
AND MANAGEMENT AUTOMATION
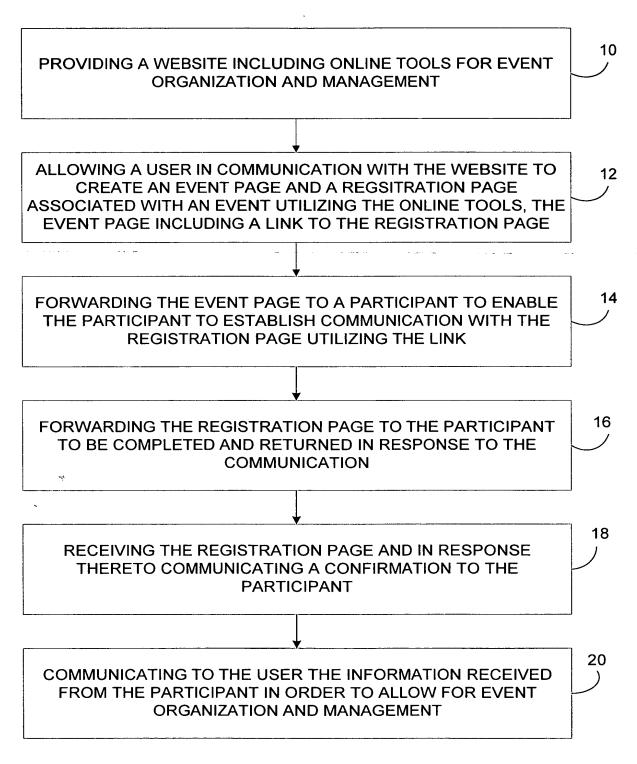Docket No.: 17267-000010
Sheet 1 of 11

PROVIDING A WEBSITE INCLUDING ONLINE TOOLS FOR EVENT ORGANIZATION AND MANAGEMENT   10

ALLOWING A USER IN COMMUNICATION WITH THE WEBSITE TO CREATE AN EVENT PAGE AND A REGSITRATION PAGE ASSOCIATED WITH AN EVENT UTILIZING THE ONLINE TOOLS, THE EVENT PAGE INCLUDING A LINK TO THE REGISTRATION PAGE   12

FORWARDING THE EVENT PAGE TO A PARTICIPANT TO ENABLE THE PARTICIPANT TO ESTABLISH COMMUNICATION WITH THE REGISTRATION PAGE UTILIZING THE LINK   14

FORWARDING THE REGISTRATION PAGE TO THE PARTICIPANT TO BE COMPLETED AND RETURNED IN RESPONSE TO THE COMMUNICATION   16

RECEIVING THE REGISTRATION PAGE AND IN RESPONSE THERETO COMMUNICATING A CONFIRMATION TO THE PARTICIPANT   18

COMMUNICATING TO THE USER THE INFORMATION RECEIVED FROM THE PARTICIPANT IN ORDER TO ALLOW FOR EVENT ORGANIZATION AND MANAGEMENT   20

FIG. 1

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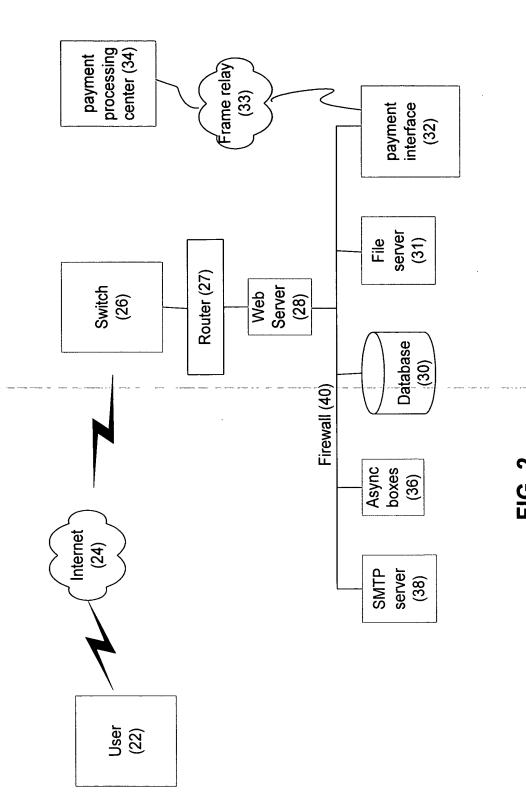AND MANAGEMENT AUTOMATION
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FIG. 2

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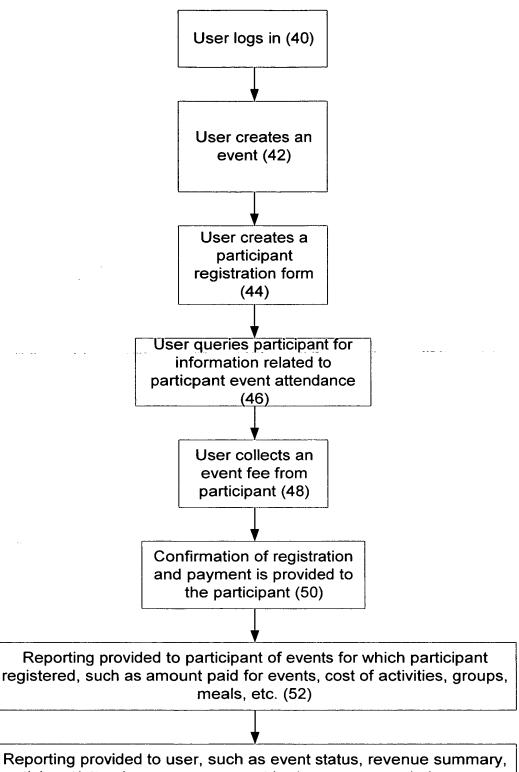AND MANAGEMENT AUTOMATION
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User logs in (40)

User creates an event (42)

User creates a participant registration form (44)

User queries participant for information related to particpant event attendance (46)

User collects an event fee from participant (48)

Confirmation of registration and payment is provided to the participant (50)

Reporting provided to participant of events for which participant registered, such as amount paid for events, cost of activities, groups, meals, etc. (52)
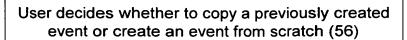
Reporting provided to user, such as event status, revenue summary, participant/attendee summary, event budget, accommodations report, participant profiling, etc. (54)

FIG. 3

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User decides whether to copy a previously created event or create an event from scratch (56)

↓

User determines event page format, such as selecting an image from the image gallery to include on the event page, customizing field labels, etc. (58)

↓

User determines event details, such as whether a fee will be associated with the event, such as capacity of event, whether a meal is included, whether a promotion code is associated with the event, whether transaction fee is absorbed by the user or passed through to the participant, etc. (60)

↓

User determines invitee details, such as whether potential particpants are invited according to a contact file or participant parameters (62)

↓

User determines event invitation forwarding format, such as email, ground mail, etc. (64)

↓

User determines display format to present to the participant following registration, such as whether a link will be provided to the particpant following registration for the event, confirmation of registration and payment, etc. (66)

FIG. 4

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```
┌─────────────────────────────────────────────────────┐
│  User imports contact files from any source into     │
│  address book                                         │
│  (68)                                                 │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│  Assign file fields                                   │
│  (70)                                                 │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│  Update grid to reflect new contacts                  │
│  (72)                                                 │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│  Group contacts                                       │
│  (74)                                                 │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│  Add/modify groups                                    │
│  (76)                                                 │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│  Select a group for a broadcast regarding an event    │
│  (78)                                                 │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│  determine requirements for sharing/restricting       │
│  address book                                         │
│  (80)                                                 │
└─────────────────────────────────────────────────────┘
```
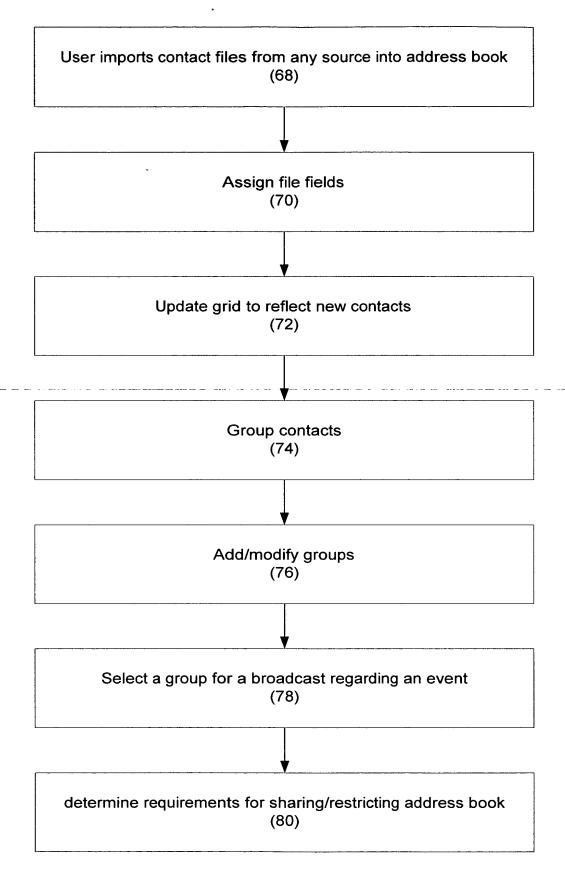
FIG. 5

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User goes to registration set-up page (82)

User determines whether to build a registration form from scratch or to create a registration form using information from a previous event (84)

User selects add activity and enters information about an activity, such as attendee classification, number of guests, etc. (86)

User returns to set-up page and continues building registration form until complete (88)

User previews the registration form (90)

User launches event (92)

FIG. 6

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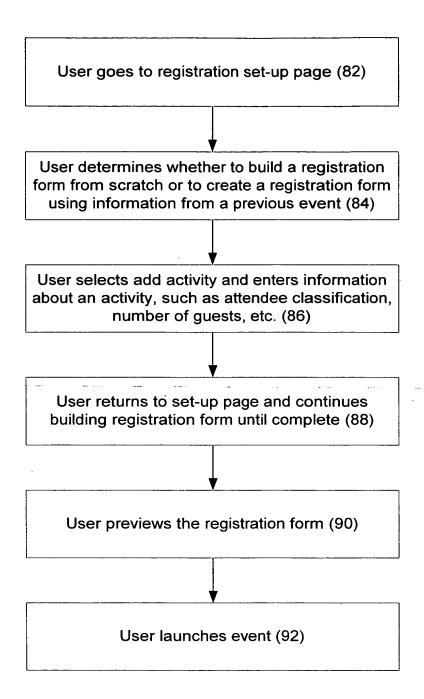Docket No.: 17267-000018
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User or participant logs in as participant
(94)

Display list of events associated with participant
(96)

Select event with which registration to be modified is associated
(98)

Review summary page display including selections from registration
(100)

Make changes
(102)

Review summary page displaying modifications to registration
(104)

Is there
a fee associated
with the event?
(106)

yes → Credit prior registration fee and charge new fee (108)

no

Is a
fee charged
for modifying the
registration?
(110)

yes → Charge the fee (112)

no

Provide a registration receipt, such as a ticket, a confirmatory email, etc.
(114)

FIG. 7

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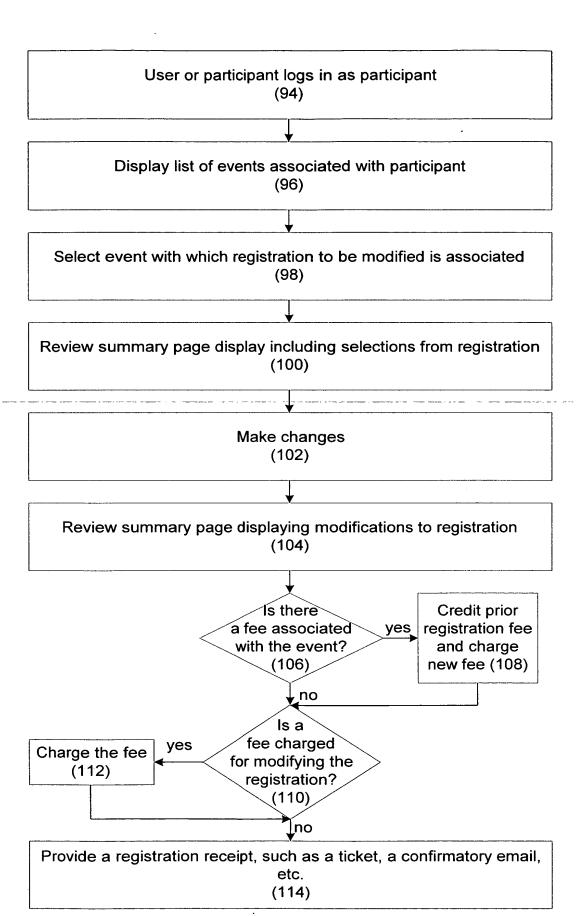Docket No.: 17267-000018
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```
┌─────────────────────────────────────────────────────────┐
│   User opens account with a payment processing center    │
│                          (116)                            │
└─────────────────────────────────────────────────────────┘
                             │
                             ▼
┌─────────────────────────────────────────────────────────┐
│  User provides a division number from the payment         │
│                  processing center                        │
│                          (118)                            │
└─────────────────────────────────────────────────────────┘
                             │
                             ▼
┌─────────────────────────────────────────────────────────┐
│  The division number is associated with participants      │
│  submitting payment for the user's event when transmitted │
│  to the payment processing center                         │
│                          (120)                            │
└─────────────────────────────────────────────────────────┘
                             │
                             ▼
┌─────────────────────────────────────────────────────────┐
│   A summary report of payments is provided to the user    │
│                          (122)                            │
└─────────────────────────────────────────────────────────┘
                             │
                             ▼
┌─────────────────────────────────────────────────────────┐
│  Details regarding participants is provided to the user,  │
│  such as participant payments, refunds provided to        │
│  participant on behalf of the user, etc.                  │
│                          (124)                            │
└─────────────────────────────────────────────────────────┘
```

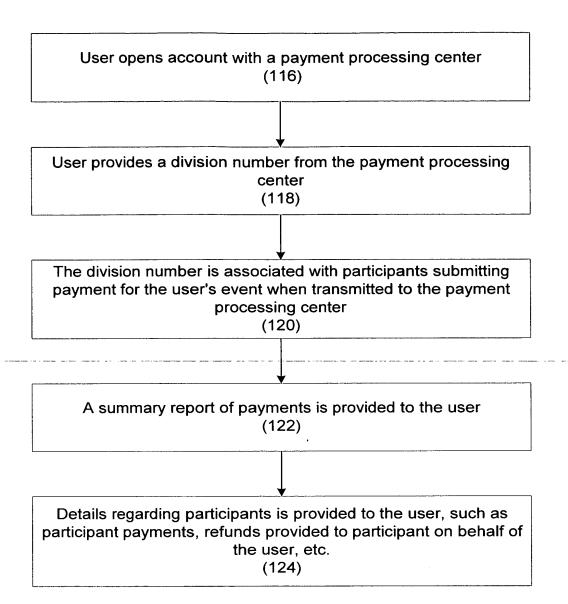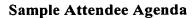# FIG. 8

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Sample Attendee Agenda

(126) Attendee Name: John Smith

(128) Event Name: ABC 5th Annual National Sales Training Conference

(130) Event Date: April 3 – 5, 2001

Registration Details (132)

Registration (138)	Date & Time (140)	Amount (142)
Opening Session (Mandatory)	4/3/2001 9:00 AM	$0.00
Sales Strategy Seminar	4/3/2001 2:00 PM	$100.00
Dinner with VP of Sales	4/3/2001 7:00 PM	$0.00
Selling Seminar	4/4/2001 9:00 AM	$200.00
Top Salesperson Award	4/4/2001 6:00 PM	$0.00
Sales and Marketing Training	4/5/2001 9:00AM-3:00 PM	$300.00
Closing Reception	4/5/2001 5:00 PM	$0.00

Questions and Answers (134)

Question (144)	Answer (146)
What is your shirt size?	Large
What's your selling territory?	West Coast
Did you attend last year's conference?	No
Do you need pick up at the airport?	Yes

Meal Preferences (136)

Meal Name (148)	Meal Selection (150)	Answer (152)
Dinner with VP of Sales	Appetizer	Crab Cake
	Entrée	Salmon
	Dessert	Cheesecake
Top Salesperson Award	Appetizer	None
	Entrée	Chicken Pasta
	Dessert	Apple Pie
Closing Reception	Appetizer	Stuffed Mushroom
	Entrée	Filet Mignon
	Dessert	Fruit Tart

FIG. 9

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┌──────────┐     ┌──────────────┐        ┌─────────────────────────┐  ┌──────┐  ┌─────────────┐
│  Event   │ ◄─► │    Task      │ ═══►    │ Action Request  (158)   │  │email │  │ user (actor)│
│ Planner  │     │ Management   │         │                         │  │      ├─►│    (160)    │
│  (154)   │     │   (156)      │         │ Template                │  └──────┘  └─────────────┘
└──────────┘     └──────────────┘         │ list of actors (users   │  ┌──────┐  ┌─────────────┐
                                          │ with role)              │  │email ├─►│ user (actor)│
                                          │ task description        │  │      │  │    (160)    │
                                          │ event context           │  └──────┘  └─────────────┘
                                          │ task parameters         │  ┌──────┐  ┌─────────────┐
                                          │ reports on completion   │  │email ├─►│ user (actor)│
                                          │                         │  │      │  │    (160)    │
                                          └─────────────────────────┘  └──────┘  └─────────────┘
```

Event Planner (154)

Task Management (156)

Action Request (158)

Template
list of actors (users with role)
task description
event context
task parameters
reports on completion

email → user (actor) (160)

email → user (actor) (160)

email → user (actor) (160)

Tasks reviewed in task management (172)

Task hierarchy:
action request
  specific actors   status

Issue reminder/broadcast email

email has link to page in flow in event context (162)
(user has permissions and data access appropriate to role)

Upon entry, task status is updated to *In Progress* (164

Task status is updated to *Complete* (170)

User enters their view of Task Management (168)

Task is performed (166)

FIG. 10

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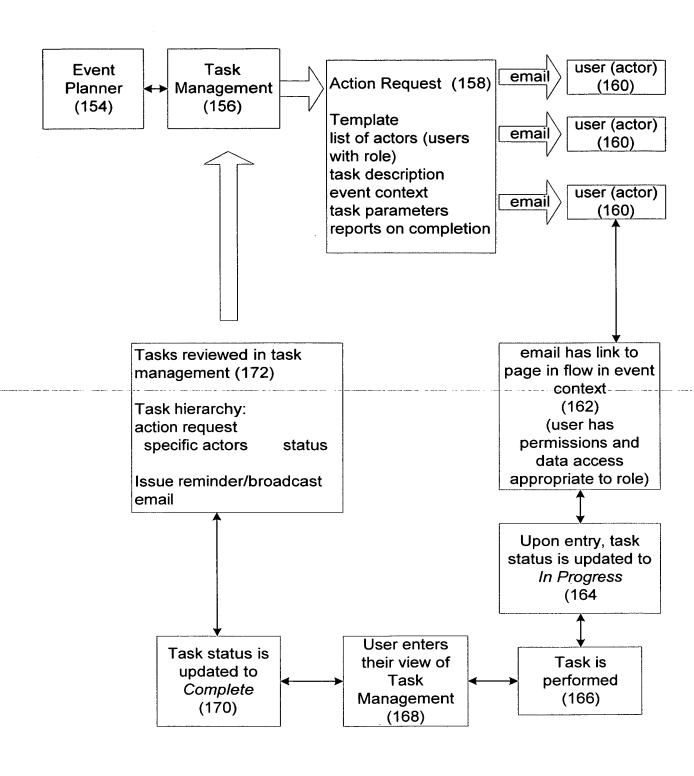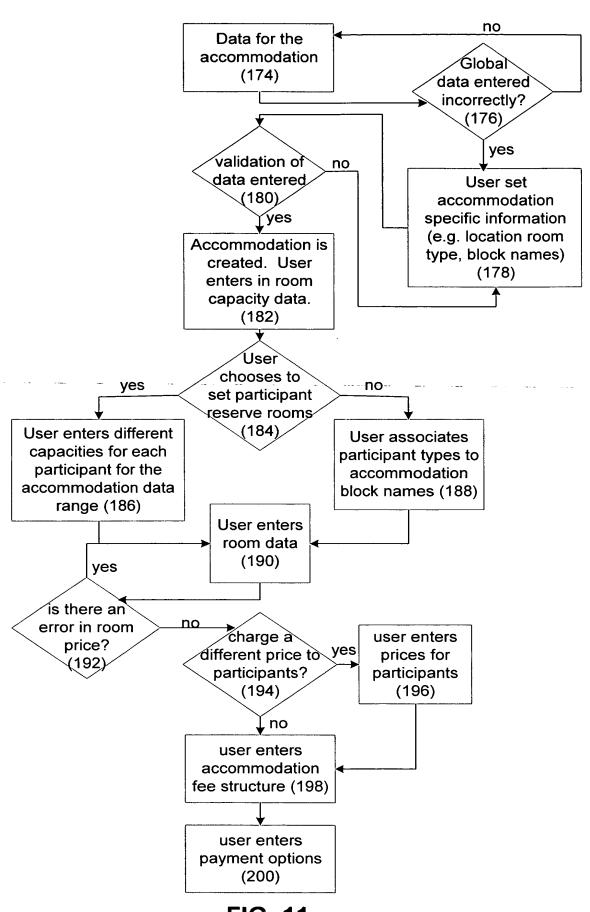Docket No.: 17267-000019
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Data for the
accommodation
(174)

Global
data entered
incorrectly?
(176)

no

yes

validation of
data entered
(180)

no

yes

User set
accommodation
specific information
(e.g. location room
type, block names)
(178)

Accommodation is
created. User
enters in room
capacity data.
(182)

User
chooses to
set participant
reserve rooms
(184)

yes

no

User enters different
capacities for each
participant for the
accommodation data
range (186)

User associates
participant types to
accommodation
block names (188)

User enters
room data
(190)

yes

is there an
error in room
price?
(192)

no

charge a
different price to
participants?
(194)

yes

user enters
prices for
participants
(196)

no

user enters
accommodation
fee structure (198)

user enters
payment options
(200)

FIG. 11